



Training & Development Services Section
Department of Employee Relations

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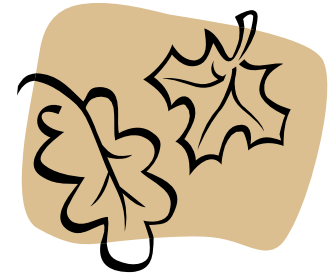
<http://www.milwaukee.gov/der>

September 28, 2006

FMIS / HRMS

Fall Training Bulletin

(October - December, 2006)



The following FMIS courses will be offered:

- ☒ Voucher Processing
- ☒ Advanced Voucher Processing
- ☒ Maintaining Vendor Information
- ☒ Query for FMIS Financials: Beyond the Basics
- ☒ Requisition and Direct Purchase Order Entry
- ☒ Billing and Accounts Receivable Processing
- ☒ Cash Receipts and Entry
- ☒ Understanding Commitment Control for Managers
- ☒ Understanding Financial Transactions for Managers
- ☒ New! Financials Round Table

The following HRMS courses will be offered:

- ☒ Hire Workforce
- ☒ HRMS Inquiry and Maintenance
- ☒ HRMS Inquiry for Managers
- ☒ Query for HRMS: Beyond the Basics

HRMS TRAINING:

COURSE #026: Hire Workforce

No. of Openings:	19
Date and Time:	Monday, October 23, 2006; 8:30 am – 12:30 pm
Location:	Room B-6, City Hall
Presenter:	Marti Cargile, Department of Employee Relations

Prerequisites:

A basic familiarity with the PeopleSoft system is assumed. If you have no prior PeopleSoft experience, it is recommended you go through the Pre-Class Tutorial. The download of the Tutorial is available on the MINT (<http://mint.milwaukee.gov>). Go to the main page and click on the FMIS/HRMS link. Under “FAQs” click on the “Financials Upgrade.”

Primary Audience:

HR Specialists, department payroll clerks, or other personnel who perform HR functions.

Course Description:

This 4-hour course is designed for departmental personnel who handle details associated with the hiring of employees. Topics range from adding information related to new hires, to updating concurrent job information, to using HR reports.

The goals of this 4-hour course are for the trainee to learn how to:

- ☒ Understand Workflow and the guidelines associated with it
- ☒ Hire an employee
- ☒ Enter employee pay information
- ☒ Enter additional employee information
- ☒ Rehire an employee
- ☒ Process a concurrent job hire
- ☒ Use standard and customized reports



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Subscribers will receive a PDF copy our Training Bulletins, as well as notices of miscellaneous training programs not posted in the Bulletin. If any changes are made to the Bulletin an updated version is always available on our website.

HRMS TRAINING:

COURSE #027: HRMS Inquiry and Maintenance

No. of Openings:	8
Date and Time:	Tuesday, October 24, 2006; 8:30 am – 3:30 pm
Location:	Room B-6, City Hall
Presenter:	Marti Cargile, Department of Employee Relations

NOTE: Please enroll in **EITHER** this course OR #028, “HR Inquiry for Managers,” both **NOT** both. Each course includes the HRMS Overview.

Primary Audience:

Payroll Clerks, payroll administration personnel, and other selected department employees.

Course Description:

This 6-hour course is designed for department personnel who handle the detailed, day-to-day updating of human resources information. Indeed, maintaining information in the Human resources module is the heart of this course, for the selections made in Human Resources impact all other areas of HRMS, particularly Benefits Administration. Topics range from looking up and updating human resources information, to tracking employee benefits data, to using HR and benefits reports.

The goals of this 6-hour course are for the trainee to learn how to:

- ☒ Understand the main functions of the system
- ☒ Access HRMS
- ☒ Navigate within the HRMS system
- ☒ Understand Effective Date and HRMS terminology
- ☒ Use support resources, including PeopleBooks
- ☒ Understand the big picture of HRMS inquiry and maintenance
- ☒ Use Workflow and understand the guidelines associated with it
- ☒ View current job information, other information, personal information, and leave balances for employees
- ☒ Process personal data, job status, and other employee data changes
- ☒ Understand the rate change workflow
- ☒ Maintain earnings distribution, benefit program participation, and employment information
- ☒ Understand the separate workflow
- ☒ Use standard and customized reports

HRMS TRAINING:

COURSE #028: HRMS Inquiry for Mangers

No. of Openings:	10
Date and Time:	Wednesday, October 25, 2006; 8:30 – 10:30 am
Location:	Room B-6, City Hall
Presenter:	Marti Cargile, Department of Employee Relations

NOTE: *Please enroll in EITHER this course OR #027, “HR Inquiry and Maintenance,” both NOT both. Each course includes the HRMS Overview.*

Primary Audience:

Personnel officers, business managers, budget clerks, other personnel analysts.

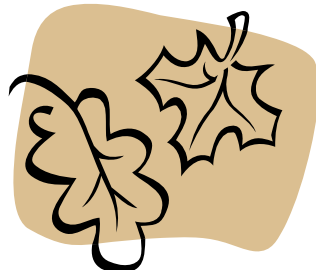
Prerequisites:

A basic familiarity with the PeopleSoft system is assumed. If you have no prior PeopleSoft experience, it is recommended you go through the Pre-Class Tutorial. The download of the Tutorial is available on the MINT (<http://mint.milwaukee.gov>). Go to the main page and click on the FMIS/HRMS link. Under “FAQs” click on the “Financials Upgrade.”

Course Description:

This is the introductory course for the Human Resources Management System (HRMS). The goals of this 3-hour course are for the trainee to learn how to:

- ☒ Understand the main functions of the system
- ☒ Access HRMS
- ☒ Navigate within the HRMS system
- ☒ Understand Effective Dates and HRMS terminology
- ☒ Understand the big picture of employee data set-up and storage
- ☒ Differentiate between the uses, format, origin, and navigation of inquiries, reports and queries.
- ☒ Access inquiries to view employee Benefit and Human Resource summary information
- ☒ Differentiate between the ad-hoc and schedules reports
- ☒ Generate Benefits and/or Human Resource reports
- ☒ Access output of Benefits and/or Resource reports
- ☒ Run queries and access their results on-line
- ☒ Understand the Report Repository



HRMS TRAINING:

COURSE #029: Query for HRMS – Beyond the Basics

No. of Openings:	8
Date:	Thursday, October 26, 2006
Time:	8:30 am – Noon
Location:	Room B-6, City Hall
Presenter:	Marti Cargile, Department of Employee Relations

Prerequisites:

- ☑ **This class is for EXPERIENCED query users.**
- ☑ If you have no prior experience, you need to go through the “Basic Query for HRMS Self-Study Guide” **prior** to attending this class. You can download the Guide on the MINT. Go to <http://mint.milwaukee.gov> and under the “Documentation/Forms” category is the link to the self-study manual.

Course Description:

For those end-users who need to create more advanced queries, this 3 ½-hour hands-on course builds upon the concepts covered in the “Basic Query for HRMS Self-Study Guide.” These topics are covered:

- ☑ Understanding how Query works in HRMS (v8.3)
- ☑ Reviewing the basic concepts of Query
- ☑ Entering advanced selection criteria
- ☑ Joining multiple tables in a single query



FMIS TRAINING

COURSE #030: Maintaining Vendor Information

No. of Openings:	10
Date:	Tuesday, November 28, 2006
Time:	1:00 – 4:30 pm
Location:	Room B-6, City Hall
Presenters:	Marti Cargile, Dept. of Employee Relations Glenn Steinbrecher, Comptroller's Office

Primary Audience:

Cross-department personnel who will be adding and maintaining vendors for both AP and Purchasing.

Prerequisites:

A basic familiarity with the PeopleSoft system is assumed. If you have no prior PeopleSoft experience, it is recommended you go through the Pre-Class Tutorial. The download of the Tutorial is available on the MINT (<http://mint.milwaukee.gov>). Go to the main page and click on the FMIS/HRMS link. Under “FAQs” click on the “Financials Upgrade.”

Course Description:

This 3 ½-hour course will introduce users to the process of adding new vendors as well as adding contact information and conversations with contacts to existing vendors at the City of Milwaukee. By the end of this course participants will be able to:

- ☒ Define “vendor” at the City of Milwaukee
- ☒ Understand how the FMIS system organizes vendor information
- ☒ Understand how vendor information is used in both **purchasing** and **accounts payable**
- ☒ Understand the Vendor Approval Process
- ☒ Add a vendor by creating a vendor profile and entering vendor payment terms, procurement options, and 1099 information
- ☒ Classify vendors
- ☒ Update vendor contacts and vendor conversations
- ☒ Understand inactivated vendors
- ☒ Use “vendor search” capabilities
- ☒ Perform on-line inquiry on vendors

FMIS TRAINING

COURSE #031: Voucher Processing

<i>No. of Openings:</i>	9
<i>Date:</i>	Tuesday, December 5, 2006
<i>Time:</i>	8:00 am – 4:45 pm
<i>Location:</i>	Room B-6, City Hall
<i>Presenter:</i>	Betty Streng, DOA-Information & Technology Management Division

Prerequisites:

A basic familiarity with the PeopleSoft system is assumed. If you have no prior PeopleSoft experience, it is recommended you go through the Pre-Class Tutorial. The download of the Tutorial is available on the MINT (<http://mint.milwaukee.gov>). Go to the main page and click on the FMIS/HRMS link. Under “FAQs” click on the “Financials Upgrade.”

Course Description:

This 8-hour course will help users utilize the key components of the accounts payable process. Topics include: payables overview, control groups, voucher types, entry and edit processes, budget checking, on-line inquiries, and accounts payable reports. By the end of this course participants will be able to:

- ☒ Set up voucher control groups
- ☒ Understand the differences between standard, express, and PO vouchers
- ☒ Enter all voucher types
- ☒ Perform budget check
- ☒ Edit vouchers
- ☒ Perform standard voucher inquiries

COURSE #032: Advanced Voucher Processing

<i>No. of Openings:</i>	9
<i>Date:</i>	Wednesday, November 29, 2006
<i>Time:</i>	8:30 am – Noon
<i>Location:</i>	Room B-6, City Hall
<i>Presenter:</i>	Tom Bolton, DOA-Information & Technology Management Division

Prerequisites

- ☒ Course #031, “Voucher Processing”
- ☒ **Two to three months** experience processing vouchers and/or purchase orders

Course Description:

Participants in this 3 ½ -hour advanced course should have had **two to three months** experience processing vouchers and/or purchase orders prior to attending this class. Topics may include:

- ☒ Review of various types of vouchers and when they are to be used
- ☒ Adjustment vouchers
- ☒ Voucher templates
- ☒ Requirements for closing purchase orders
- ☒ Steps to analyze data to facilitating the closing of purchase orders

FMIS TRAINING:

COURSE #033: Understanding Commitment Control for Managers

No. of Openings:	8
Date:	Friday, December 1, 2006
Time:	8:00 – 10:00 am
Location:	Room B-6, City Hall
Presenter:	Sharon Struble, DOA-Information & Technology Management Division

Prerequisites:

A basic familiarity with the PeopleSoft system is assumed. If you have no prior PeopleSoft experience, it is recommended you go through the Pre-Class Tutorial. The download of the Tutorial is available on the MINT (<http://mint.milwaukee.gov>). Go to the main page and click on the FMIS/HRMS link. Under “FAQs” click on the “Financials Upgrade.”

Course Description:

This is an introductory course for the City’s financial system concentrating on budgets and how transactions affect them. The goals of this 2-hour course are:

- ☒ Understand at a high level how the financial system works including a review of each of the modules that are included in the system
- ☒ Understand how department and project and/or grant budgets are stored within the system
- ☒ Understand how different types of transactions affect the budgets
- ☒ Practical exercises on how to inquire on budgets and their status

COURSE #034: Understanding Financial Transactions for Managers

No. of Openings:	8
Date:	Wednesday, December 6, 2006
Time:	8:00 – 10:00 am
Location:	Room B-6, City Hall
Presenter:	Sharon Struble, DOA-Information & Technology Management Division

Prerequisites:

A basic familiarity with the PeopleSoft system is assumed. If you have no prior PeopleSoft experience, it is recommended you go through the Pre-Class Tutorial. The download of the Tutorial is available on the MINT (<http://mint.milwaukee.gov>). Go to the main page and click on the FMIS/HRMS link. Under “FAQs” click on the “Financials Upgrade.”

Course Description:

This is an introductory course for the City’s financial system. The emphasis will be transactions that impact the City’s General Ledger. The goals of this 2-hour course are:

- ☒ Understand at a high level how the financial system works including a review of each of the modules that are included in the system
- ☒ Practical exercises on how to inquire on financial transactions including NVision reports
- ☒ Practical exercises on how to generate reports of financial transactions
- ☒ Q and A session (*optional*)

FMIS TRAINING:

COURSE #035: Query for FMIS Financials - Beyond the Basics

No. of Openings:	8
Date:	Thursday, November 30, 2006
Time:	1:00 – 4:30 pm
Location:	Room B-6, City Hall
Presenters:	Marti Cargile, Dept. of Employee Relations Glenn Steinbrecher, Comptroller's Office

Prerequisites:

- ☒ This class is for **EXPERIENCED** query users.
- ☒ If you have no prior experience, you need to go through the “Basic Query for FMIS Self-Study Guide” **prior** to attending this class. You can download the Guide on the MINT. Go to <http://mint.milwaukee.gov> and under the “Documentation/Forms” category is the link to the self-study manual.

Course Description:

For those end-users who need to create more advanced queries, this 3 ½-hour hands-on course builds upon the concepts covered in the “Basic Query for FMIS Financials Self-Study” course. These topics are covered:

- ☒ Entering advanced selection criteria
- ☒ Joining multiple tables in a single query

COURSE #036: Cash Receipts and Entry

No. of Openings:	10
Date:	Friday, December 8, 2006
Time:	1:00 – 3:00 pm
Location:	Room B-6, City Hall
Presenter:	Sharon Struble, DOA-Information & Technology Management Division

Prerequisites:

A basic familiarity with the PeopleSoft system is assumed. If you have no prior PeopleSoft experience, it is recommended you go through the Pre-Class Tutorial. The download of the Tutorial is available on the MINT (<http://mint.milwaukee.gov>). Go to the main page and click on the FMIS/HRMS link. Under “FAQs” click on the “Financials Upgrade.”

Course Description:

This 2-hour course features how to use the cash receipt and entry process in the FMIS system. By the end of this course, participants will be able to:

- ☒ Understand the overall cash receipt and entry process
- ☒ Enter deposits
- ☒ Enter direct journals
- ☒ Understand how to complete a deposit form

FMIS TRAINING:

COURSE #037: Billing and Accounts Receivable Processing

No. of Openings:	8
Date:	Monday, December 4, 2006
Time:	8:30 am – Noon
Location:	Room B-6, City Hall
Presenter:	Tom Bolton, DOA-Information & Technology Management Division

Prerequisites:

- ☒ **A basic familiarity with the PeopleSoft system is assumed.** If you have no prior PeopleSoft experience, it is recommended you go through the Pre-Class Tutorial. The download of the Tutorial is available on the MINT (<http://mint.milwaukee.gov>). Go to the main page and click on the FMIS/HRMS link. Under “FAQs” click on the “Financials Upgrade.”
- ☒ If you have no prior experience, you need to go through the “Basic Query for FMIS Self-Study Guide” **prior** to attending this class. You can download the Guide on the MINT. Go to <http://mint.milwaukee.gov> and under the “Documentation/Forms” category is the link to the self-study manual.

Course Description:

This 3 ½-hour course is especially designed for functional users of FMIS Billing. This functionality allows departments, which bill external and internal customers, to create bills within FMIS, generate invoices centrally, and maintain collections information, aging and interface to Receivables and the General Ledger. The purpose of this course is to enable City departments to perform all the processes necessary to create invoices, statements and collections in a consistent and controlled system. Participants will learn to:

- ☒ Maintain customer information
- ☒ Define accounting distributions and charge codes for their respective departments
- ☒ Maintain and create City invoices
- ☒ Review aging information and the status of receivables
- ☒ Generate appropriate reports related to bills and receivables



FMIS TRAINING:

COURSE #038: Requisition and Direct Purchase Order Entry

No. of Openings:	10
Date:	Thursday, December 7, 2006
Time:	8:30 am – Noon
Location:	Room B-6, City Hall
Presenter:	Mary Ellen Voelz, DOA-Business Operations

Prerequisites:

A basic familiarity with the PeopleSoft system is assumed. If you have no prior PeopleSoft experience, it is recommended you go through the Pre-Class Tutorial. The download of the Tutorial is available on the MINT (<http://mint.milwaukee.gov>). Go to the main page and click on the FMIS/HRMS link. Under “FAQs” click on the “Financials Upgrade.”

Course Description:

This 3 ½-hour course, for **new users and a refresher for current users**, will teach you the navigation through PeopleSoft version 8.8; how to enter a new requisition; how to enter a Direct PO as a release against a Procurement Contract (formerly known as *Vendor Contract*); and how to look up Procurement Contracts. Instructions will also be provided for the approval of a new requisition. By the end of this course, participants will be able to:

- ☒ Navigate through the v8.8 PeopleSoft Financials Purchasing modules
- ☒ Enter a new requisition
- ☒ Enter a Direct Purchase Order as a contract release
- ☒ Look up Procurement Contract data
- ☒ Teach their Approver(s) how to approve a requisition

NEW COURSE! - #039: Financials Roundtable

No. of Openings:	19
Date:	Monday, December 4, 2006
Time:	1:00 – 3:00 pm
Location:	Room B-1, City Hall (<i>Emergency Government Conference Room</i>)
Presenters:	Beverly LaFlex, Glenn Steinbrecher, Jeannie Kolter – Comptroller’s Office Sharon Struble, DOA-Information & Technology Management Division

Prerequisites:

A basic familiarity with the PeopleSoft system is assumed. If you have no prior PeopleSoft experience, it is recommended you go through the Pre-Class Tutorial. The download of the Tutorial is available on the MINT (<http://mint.milwaukee.gov>). Go to the main page and click on the FMIS/HRMS link. Under “FAQs” click on the “Financials Upgrade.”

Course Description:

This 2-hour session will be an open Question & Answer session to address questions regarding the Financial system not otherwise addressed in other courses. The emphasis will be on accounting-related questions. Various experts from the Comptroller’s Office and ITMD will be available. Participants are requested to submit one topic they would like covered so that the appropriate resources can be made available.